

Important information about this form:

- Use this form if the adult Beneficiary has reached the age of 19 and wishes to exercise signature authority and assume administrative duties on the account.
- If the Beneficiary is under the age of 19, please complete a **Change Authorized Legal Representative Form** instead.
- Before completing this form, carefully read the **Program Description & Participation Agreement**.
- An eligible person can only have one ABLE account open at any time.
- Fill out the **Bank Add/Change Request Form** to make updates to the banking information if it's affected by removing the Authorized Legal Representative.
- The adult Beneficiary must provide a Medallion Signature Guarantee.
- Type or print clearly in black ink, and do not staple the pages.

Need help?

Give us a call Monday – Friday
from 8am – 7pm CT at

1-833-711-2253

Individuals with speech or hearing disabilities may dial **711** to access Telecommunications Relay Service (TRS) from a telephone or TTY.

Mail the form to:

Alabama ABLE
P.O. Box 9894
Providence, RI 02940-8094

Overnight Mail:

Alabama ABLE
4400 Computer Drive
Westborough, MA 01581

1 ABLE account information

Name of the Beneficiary on the ABLE account (First and last)

____ _ - ____ _ - ____ _
Beneficiary's Social Security or Taxpayer Identification Number

____ _
ALABAMA ABLE account number



2 Beneficiary information

____ / ____ / ____
Date of birth (mm/dd/yyyy)

____-____-____
Telephone number

Residential address

No P.O. boxes are accepted for a residential address.

Street address 1

Street address 2

City

State

ZIP Code



3 Communication preferences

Mailing address

P.O. boxes are accepted for a mailing address.

- ☐ Use the Beneficiary's residential address as the mailing address
(Leave address information below blank))

Street address 1

Street address 2

City

State

ZIP Code

Email

Choose how you want to receive statements and tax forms for all the accounts you manage

(Please select one)

- ☐ Send digital tax forms, account information and quarterly statements by email
(Please answer **Step 3A** below)
- ☐ Send digital quarterly statements and account information by email, but send tax forms by U.S. mail*
(Please answer **Step 3A** below)
- ☐ Send quarterly statements, account information and tax forms by U.S. mail*
(You'll be charged \$10 per account, per year)

- **A** **What email address should we use?**
Answer if you've chosen to receive items by email

Email

* All documents sent by U.S. mail will be mailed to the account's mailing address.



4 Work information of the Beneficiary

Providing employment information will help us understand how the account is being funded.

What is the Beneficiary's work status? (Please select one)

- ☐ Employed ☐ Self-Employed ☐ Retired or Not Working

A What's your occupation (Please select one)

Answer if **employed** or **self-employed**:

<input type="radio"/> Accounting/Auditing	<input type="radio"/> Hospitality/Food
<input type="radio"/> Admin/Clerical	<input type="radio"/> Independent Investor
<input type="radio"/> Art/Antiques Dealer	<input type="radio"/> Information Technology
<input type="radio"/> Banking Professional	<input type="radio"/> Insurance
<input type="radio"/> Car/Boat/Airplane Dealer	<input type="radio"/> Legal Services
<input type="radio"/> Casino/Gaming	<input type="radio"/> Manufacturing/Production
<input type="radio"/> Construction/Skilled Trade	<input type="radio"/> Nonprofit Executive
<input type="radio"/> Creative/Design/ Architectural	<input type="radio"/> Operations
<input type="radio"/> Defense/Military	<input type="radio"/> Other:
<input type="radio"/> Editorial/Writing/Publishing	<div><div></div><div>(Please write in your occupation)</div></div>
<input type="radio"/> Education	<input type="radio"/> Public Service
<input type="radio"/> Elected Official/Embassy	<input type="radio"/> Retail/Sales/Real Estate
<input type="radio"/> Engineering/Science/R&D	<input type="radio"/> Student
<input type="radio"/> Entertainment/Sports/Arts	<input type="radio"/> Transportation/ Warehousing
<input type="radio"/> Financial Services	
<input type="radio"/> Health Care Professional	

B Please choose all of your sources of income (Select all that apply)

Answer if **retired or not working**:

☐ Retirement Savings

☐ Spousal Support

☐ Social Security or Pension

☐ Other Government Services

☐ Other:

(Please write in all other sources)



5 Verify your identity

The Beneficiary must provide identification to prove their identity if they reached the age of 18 since opening the account.

How to provide identification

Acceptable ID Documentation

Option A

Include a copy of a Department of Motor Vehicles State ID

Option B

Include a copy of both your Social Security card and your birth certificate

To help the government fight the funding of terrorism and money laundering, federal law requires us to obtain certain personal information: your name, address, date of birth, and Social Security number or taxpayer identification number and other information that will allow us to verify your identity. If we are unable to verify your identity, we may have to close your account or take other steps we think are necessary.



6 Sign the form

By signing below, I am agreeing to the terms and conditions set forth below and in the **Program Description & Participation Agreement**. I understand and agree that those documents govern all aspects of this Account and are incorporated herein by reference.

I will retain a copy of the **Program Description & Participation Agreement** for my records. I understand that the Alabama ALE program may, from time to time, amend the **Program Description & Participation Agreement**, and I understand and agree that I will be subject to the terms of those amendments.

I certify that all of the information provided by me on this form is, and all information provided by me in the future will be, true, complete and correct and I authorize the Program to open this Account based upon this information.

Additionally, I certify under penalty of perjury:

- The Beneficiary's disability or blindness is expected to result in death or has lasted, or can be expected to last for a continuous period of not less than 12 months and that I will notify the Program of any change to the status of the beneficiary's disability or blindness (including any potential cure or remission of such disability or blindness) promptly upon such occurrence.

Signature of adult Beneficiary

Date (mm/dd/yyyy)



7 A Medallion Signature Guarantee is required for the adult Beneficiary

Keep in mind that:

- You're providing the following information as underwritten certification that your signature is genuine.
- You can get a Medallion Signature Guarantee from an authorized officer of a bank, broker, or other qualified financial institution. A notary public doesn't qualify, and you cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the ALE account.
- Only sign if you are in the presence of an authorized officer providing the Medallion Signature Guarantee.

I certify that the information provided herein is true and complete in all respects, and that I have read and understand, consent, and agree to all the terms and conditions of the **Program Description & Participation Agreement**.

Signature of Beneficiary — If over the age of 18

Signature Guarantor

Title

Name of Institution

Date (mm/dd/yyyy)

Have the Authorized Officer stamp here